PowerSchool End-of-Year Process Checklist

Parts of the preparation for the EOY process are done at the school/building level, and some are done at the district level. Unless otherwise instructed, run each step at the school building level.

COMPLETE APPENDIX A - Before beginning this checklist, you should confirm with your
EMIS Coordinator that he/she has completed all the steps on the PowerSchool End of Year EMIS Updates for Graduates list. See Appendix A at the end of this document.
1. Verify Sched_NextYearGrade is accurate for all students.

This can be done individually on the Scheduling Setup student screen, or processed in groups by updating the Sched_NextYearGrade field with an import or using the Student Field Value group function.

Select grade levels, one at a time, and use the group function "Student Field Value" to change the **Sched_NextYearGrade** field.

Notes:

- **Graduating HS Seniors**: Sched NextYearGrade field should be set to 99.
- Career Center Schools: Your seniors who have completed requirements and are graduating should be transferred out using Exit Code '41'. They should not be transferred into the Career Center's Graduated Students building. If you wish, you can create a special building named for example, a "Completer Building". You can move your 21-22 students who successfully finished your programs into the Completer Building. For the future, you will have to wait until the End of Year Student Collection closes before you can move other students, for example 2020 completers. NOTE: If the Sched_NextYearGrade field is set to '12', the EOY process WILL allow the Next_School to be something OTHER than the 999999 Graduated Students school.
- **Grade_level 13 & 14** students: Data for these students should be handled on an individual basis and should be completed with the help of guidance staff.
- **Community Schools**: If your school does not have any graduating seniors, students in your highest grade level should be transferred out using the Group Function "Transfer Out Of School" with Exit Code '41'. (They are not graduates and should not be transferred into your Graduated Students building.)
- **ESC's**: Any PreSchool students who are advancing to KG and therefore, leaving the ESC should be transferred out using Exit Code '36'.
- **Pre-Registered Students:** Since the EOY processes pre-registered students as well as active, select pre-registered students and update their Sched_NextYearGrade field. Search command is: /enroll_status=-1;grade_level= (specify a grade level) Set their sched_nextyeargrade to the grade they will be in next year; so it will match their grade_level.

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Sched_nextyeargrade= (leave a blank) Make changes on the student's "Scheduling Setup" page. NOTE: Modify this field individually or in groups for those students that will be retained. The Sched NextYearGrade field will need to be completed retained students, but, not incremented to the next grade level. 2. Verify Next school is accurate for each school. This can be done individually on the Scheduling Setup student screen, or processed in groups by updating the Next School field with an import or using the Student Field Value group function. Select all the students /grade_level<12 and use the group function "Next School Indicator" to choose the next school. (See notes above in Step 1) Then select the /grade_level=12 and further refine your search: &/enroll_status=2, then further refine your search using &/exitdate=MM/DD/YYYY (date used when these students were transferred out). Select the group function "Next School Indicator" & select the Graduated Students school. Then select the /grade_level=13 (or 14) and use the group function "Next School Indicator" to choose the next school. If you have students in an Electronic Building – please double check that these student's Next School is also set properly. NOTE: Modify this field individually or in groups for those students that will be retained. The Next School field will need to be completed for retained students, but, not incremented to the next grade level. 3. Verify Years & Terms are 100% accurate for all buildings in your district. At District Level - District > Years & Terms ***At the District level. *** At School Levels - School > Years & Terms At Graduated Students School *** Remember to also set up the Years & Terms (for full year only) in the Graduated Students "School" for each year that is setup in the HS. (This is so that historical grades will appear correctly on transcripts printed from the Graduated Students school.)*** Do NOT add extra days to the school year or have gaps between terms! The end date for each term must be the day before first day of the next term! 4. Verify a default FTE is set for all grade levels in all buildings. To access the FTEs for the upcoming school year, select the upcoming school year from the Term menu then navigate to Start Page > School Setup > Full-Time Equivalencies (FTE). Click on the Full-Time/Regular FTE and confirm that default FTEs have been checked for each grade level.

When you have completed updating all grade levels, to make sure no student was

missed: Search for students where the **Sched NextYearGrade** is blank.

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5. Verify Schedules are committed for each school that used PowerScheduler.

6. Course Enrollment Fees: From PowerSource: Course Enrollment fees do not carryover from one year to the next. Each course enrollment fee is specific to a course, school, and school year. Course enrollment fees must be set up every school year. Recommend waiting until after EOY to add/adjust Course Enrollment Fees for next year.
7. Verify school fees are accurate if applying at school level. ***At the District level. ***
At District Level – District > Schools/School Info > (Pick the school.) > Add/Adjust "School Enrollment Fees"
8. Verify lunch balance. (Optional and only for PowerLunch users.)
Note: When running the End of Year Process, PowerSchool rolls over each student's current balance as the beginning balance and clears all meal transactions from the [GLDetail] and [Batches] tables.
To preserve a copy of historical lunch data, export the records from the GLDetail table.
It is also recommended that you print certain PowerLunch reports before closing out the school year. These reports are unavailable for any school year that has been closed out by the End of Year Process
 Start Page > PowerLunch > Cash Report Start Page > PowerLunch > Meal Count Listing Start Page > PowerLunch > Meal Count Report
9. Verify fee balances. Fee balances can be cleared or transferred from one year to the next.
You can get a list of fee balances from PowerSchool with a 2-step process.
First, select the students with a balance using the following search command:
*fee_balance.balance>0
Then, select the Quick Export group function:
Special Functions > Importing & Exporting > Quick Export
In the Quick Export box, enter any student "field" that you want. Example lastfirst grade_level ^(Fee_GetStudentBalance) Click Submit
9b. Optional: If you want to turn off or delay the automatic assessment of school and/or course fees for next year, see step 34; this can be done just before or immediately after EOY is processed.
10. Clear activities for all students if you do not want those carried forward. Start Page > System Administrator > Clear Activities

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11. Check for duplicate students. (This check can also be run at the District level to check for duplicate entries throughout the district.)
Select, list & examine a student list for duplicates. The following selection process will yield all active transferred out and pre-enrolled students. (Suggestion: Include Last_name & first_name fields.)
Select:/enroll_status=0 +/enroll_status=2 +/enroll_status=-1
List: Select "List Students" from the group functions list. If duplicates are found, select the record to be eliminated, and transfer it out of school. Suggest changing the last & first name fields to reflect "duplicate record".

12. Run reports as desired.

These reports must be run <u>before</u> End of Year Process:

Attendance Summary by Grade Period Attendance Verification
Year-to-Date Attendance Summary At Risk Report
Parental Access Statistics Class Ranking
Grade Count or by Teacher Grades Distribution
Graduation Progress Report Honor Roll
Standards Teacher Gradebooks

Meal Count Listing (PowerLunch) Meal Count Report (PowerLunch)

Fee Balances (see step #9)

• These reports may be run <u>after</u> End of Year Process:

Absentee ADA/ADM
ADA/ADM by Minute ADA/ADM by Student
Aggregate Membership Audit Attendance Count

Class Attendance Audit Class Size Reduction Report

Consecutive Absences Enrollment by Grade

Enrollment by Section Enrollment Summary by Date
Monthly Student Attendance Report School Enrollment Audit
Section Enrollment Audit Student Attendance Audit

Weekly Attendance Summary (Daily) Weekly Attendance Summary (Meeting)

Master Schedule (PDF) Student Schedule Listing

Teacher Maximum Load Report Discipline Log
Discipline Summary Class Rosters (PDF)

13. Verify all grades are stored.

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14. Verify accuracy of data **21-22 school year**.
School enrollment audit report Start Page > System Reports > School Enrollment Audit (If no students are found, this means you have no school enrollment issues). For any students found, check the Transfer Info records.
Section enrollment audit report Start Page > System Reports > Section Enrollment Audit Typically, students identified are non-attending, such as open enrolled out. For any students found, check their All Enrollments page and their Transfer Info page. NOTE: If the Section Enrollment Audit is run after students are scheduled into sections for the next school year, but the school has not yet run the End-Of-Year (EOY) process, the Section Enrollment Audit will list next year's sections as conflicting with the current school year. (After the EOY process has been completed, the Section Enrollment Audit will be accurate.) Ignore these messages until after EOY.
Data validation reports *** Done at the District level* ** System > Special Operations > Data Validation Reports The validation reports should be executed in the order listed below. Any errors should be carefully reviewed. (A report with only a header row indicates there are no errors.)
Terms Courses Sections Students Schools Terms Bins Teachers Grade Scales GS Items (Errors on Grade Scales not used can be ignored) CC
NOTE: If you have errors (i.e. Milan Sync errors) and need assistance, please enter a HelpDesk ticket using thi URL: http://www.nwoca.org/submit-a-ticket For the NWOCA Service Area, select Student Services.
15. **OPTIONAL: Clear locker numbers/combinations. Search /locker_number# Then use the "Student Field Value" group function to clear fields. And/Or /locker_combination# Then use the "Student Field Value" group function to clear fields. New locker numbers and combinations can be added individually or they can be imported.
16. **OPTIONAL: Update homerooms as needed. Search: /home_room# (this search command selects students whose home_room field is not blank.) Then use the "Student Field Value" group function to clear the home_room field. Enter home_room info individually, by groups or by importing. The Home_room fields is located on the student's Modify Info page.

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17. **OPTIONAL: If your district has moved to PowerTeacher Pro - Create Next Year's Calculations Prior to
End-of-Year

Manage Next Year Calculations

Use this optional feature to create a copy of the calculation settings for the next school year during the current year. After completion, change the calculations as needed for the next school year without affecting calculations for the current school year. Note that if this process is used, subsequent changes to the current year calculations will not be migrated to the next year calculations as part of the end-of-year process.

The next school year must already be created at the District Office in PowerSchool in order to use this feature.

At each building, create the Final Grade / Reporting Term Setup

On the start page, go to each Building in the <u>next school year term</u> > School > Final Grade/Reporting Term Setup. (You can look at the current year for an example of how to set this page up.)

Then

Create Next Year's Calculations Prior to End-of-Year

- 1. On the start page in the current year term, go to District > PowerTeacher Pro Settings > Manage Next Year Calculations.
- 2. Click Create Calculations.
- Navigate to the Calculation Formulas page (Start Page > District > PowerTeacher Pro Settings) and change the Term to next year to work with the calculation formulas you just created.



- The following Steps (18-43) should NOT be completed until:

- Your EMIS Coordinator indicates that they are ready and have run the state EMIS "SNAPSHOTS" and EMIS EOY process AND
- You have verified that ALL buildings who scheduled in PowerScheduler have Committed the 22-23 scheduling year AND
- You have verified that ALL buildings have complete steps 1-17 of this document.
- Instructions for running SNAPSHOTS are available in the Help Section of your PowerSchool server State Reporting Help State Reporting Setup End of Year (EOY State Processes) Step 6 in Order of Operations.

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	18. Added	to check	list 7/2	6/2012:
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As part of the "End of School Year Checklist" districts transferred out Graduated Students with the Exit code of "99". This was needed to ensure proper reporting for EMIS "Yearend (S)" data. However, this is not exactly what PowerSchool End of Year needed to function properly. In order for PowerSchool EOY to work, a change needs to be made to the Enroll_Status; changing the Enroll_Status from "2" to "0".

At the District Office level, in the 21-22 term...

Search for all Graduated Students using the following search command:

/Enroll_Status=2;Grade_Level=12;ExitCode=99

Verify that this is your group of Graduated Students. The total count may not be all your graduates though. This count will depend on what you did to get the exit code to be "99" for EMIS. The verification should be to make certain student showing up are graduates and not underclassmen.

Use the Group Function "Student Field Value" to change the Enroll_Status field for this group of students to the number 0 (a zero). Click Submit

Continue with remaining steps for the EOY process.

→ Keep these students as your selection and complete this next step:

Special Functions > Group Functions > Next School Indicator and select Graduated Students from the drop down and Submit

19. Make note of the time so a rollback can be completed if needed.

20. Begin PowerSchool EOY Process

Switch to the District Office And Set Term to 2021-2022

<u>Pearson recommends that the EOY Process be run on the server when the person doing the process is the only account logged in on the server.</u>

(To verify that no other users are logged onto your server: Special Functions > Current Users)

Start Page > System > End-of-Year Process * ***At the District Office **
NOTE: At the bottom of this page, there is a drop down box with the following choices:

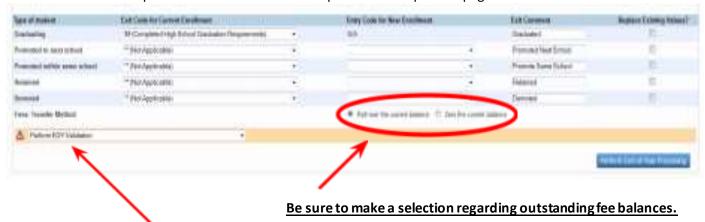
Perform EOY Validation
Perform EOY Validation and make any students with issues the current selection
Perform EOY and Promote Students

Run the EOY process first choosing either "Perform EOY Validation" or "Perform EOY Validation and make any students with issues the current selection".

- Correct any errors and re-run the validation.
- Repeat until no errors exist.

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Below is a sample of how to fill out the lower portion of the process page:



When error free, run again, this time choose Perform EOY and Promote Students from the drop down menu.

This process may take anywhere from several minutes up to several hours depending on the size of the district.

After starting the End of Year Process, PowerSchool will provide you with feedback on the progress of the End of Year Process.

Leave your browser on this page while the End of Year Process is running. This progress indicator will display several messages as shown in the following screen shot.

End-of-Year Process - (a.k.a. Promote Students) Progress

Beginning End-of-Year Process
Processing 17337 students
Validating student's promotion readiness
Validation complete
End-of-Year Process not completed. The following errors occurred: Adair, Brandon:
Next_School (0) is not a valid school in this district.
Next_School is blank
Grade Level is 99 and Next School Indicator is not "Graduated Students"
End-of-Year Process not completed. The following errors occurred: Adair, Brandon:
Next_School (0) is not a valid school in this district.
Next School is blank

21. Run the (EOY) End of Year State-Level Data Update Process

Start Page – System Reports – State EOY – (EOY)End of Year State Update

. Grade Level is 99 and Next School Indicator is not "Graduated Students"

Additional instructions for this are included in your PowerSchool server under the Help button then State Reporting Help-State Reporting Setup- End of Year (EOY) State Processes - Step 7 under Order of Operations.

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scho	school year.		
	22. Verify students were promoted.		
	 23. Verify graduated students are now in the Graduated building. Remember to use a / in order to pull up the students 		
	24. Verify FTEs are assigned to all students. Search command: FTEID=		
	25. Verify Schedules are accurate.		
	26. Verify and update any retained students.Update sched_nextyeargrade		
	27. Update any attendance codes that will be in place for new school year. Start Page > School > Attendance Codes		
	28. Update any attendance categories for new school year. Start Page > School > Attendance Categories		
	29. Update any changes to attendance conversion for new school year. Start Page > School > Attendance Conversions		
	30. Verify Bell Schedules Start Page > School > Bell Schedules		
	31. Verify Terms are accurate. At District Level - District > Years & Terms ***At the District level.*** At School Levels - School > Years & Terms		
	32. Verify Days are accurate. Start Page > School > Days		
	33. Verify that Periods are accurate. Start Page > School > Periods		
	34. Verify that the school year calendar is setup. Start Page > School > Calendar Setup		
	35. Schedule elementary students as needed.		
	36. (Optional): If you would like to delay the automatic assignment of Course and/or School enrollment fees, here are the steps:		
	At District Level > District > set the Term to the new school year > Schools/School Info, select your school,		

Post PowerSchool End-of-year. The following items should be done in EACH building in the **22-23**

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then scroll down to the "Fee Exemption Status" field. Use the drop-down list and select one of these options: Students Exempted from Course Fees, Students Exempted from School Fees, or Students

- 37. **OPTIONAL: Hide Class Schedules from Parents/Student Portal for Next Year.
 - Select the checkbox to hide classes for this term from parents/students in the PowerSchool Student and Parent portal, PowerSchool Mobile app, and Unified Classroom. Otherwise, leave unchecked. Once submitted, an asterisk appears next to the term indicating that classes for the term are hidden from parents/students.
 - Note: This setting is only applicable to the selected term. If a year contains multiple terms that you want to hide, you will need to select this setting for each of term that courses are associated with.

At the School Level > School > Years and Terms > Edit Terms for the 2022-2023 School Year > To Start > Click on 2022-2023 > Check box for **Suppress Classes for This Term From Parent/Student Users** > Submit. Do this step for each term.



EMIS related fields to be updated post-EOY process:

This can be done individually on the State/Province-OH student screen, or processed in groups by updating the OH_State_Grade_Level field with an import or using the Student Field Value group function. NOTE: May have been updated during the EOY State Update Process.
39. Update grade level next year field FN record. This can be done individually on the State/Province-OH student screen, or processed in groups by updating the S_OH_STU_FN_X.Next_Year_Grade field with an import or using the Student Field Value group function.
40. Update retained reasons on the FN record. This can be done individually on the State/Province-OH student screen, or processed in groups by updating the S_OH_STU_FN_X.Retained_Status field with an import or using the Student Field Value group function. (Preschool students repeating preschool do not need a retained status, as preschoolers may be in preschool multiple years.)

Note: Only reported for students whose District Relationship is 1, whose latest FS record is reported with a Withdrawal Reason of '**'. **See EMIS Manual Section 2.6**

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enrolled in the regular next school. S_OH_STU_FN_X.Next_School (FN390)

Complete post-EOY process:

42. Attending Building IRN for EMIS on the FS tab - the value must be updated for students who have
changed buildings. If your district is using an electronic building; students in that building will need every field that contains an IRN populated.
43. In the Graduated Students Building, you may need to make some adjustments. Those adjustments may include, but are not limited to:
43a. Transcript:
 Create a transcript for graduated students only if desired.
 Edit the object that contains student demographics and remove the tag that prints the student Grade Level, as the grade level would print as '99'. Example:
<tabl 0.375="">Grade<tabl 1.25="">^(Grade_Level)</tabl></tabl>
<tabl 0.375="">Birthdate:<tabl 1.25="">^(DOB)</tabl></tabl>
<tabl 0.375="">Gender:<tabl 1.25="">^(decode;^(gender);m;Male;F;Female)</tabl></tabl>

<tabl 0.375>Student ID:<tabl 1.25>^(Student_Number)

43b. Other General Modifications in the Graduated Students School:

<tabl 0.375>SSN:<tabl 1.25>^(SSN)

- **Very Important**: To prevent Class Rank from being run in the Graduated Students school, which would erase the class ranking info that followed the students when they were transferred into this school, set the Recalculation Frequency to "Manually":
 School > Class Rank > Recalculation Frequency > Select "Manually".
- Create additional Years and Terms for historic grades to be identified with the proper school year. School > Years & Terms > New

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Appendix A

PowerSchool End of Year EMIS Updates for Graduates

******Before moving your graduates, make sure class rank has been updated, grades have been stored and transcripts have been printed. Open communication between you and the counselors is HIGHLY recommended before you begin this task. *****

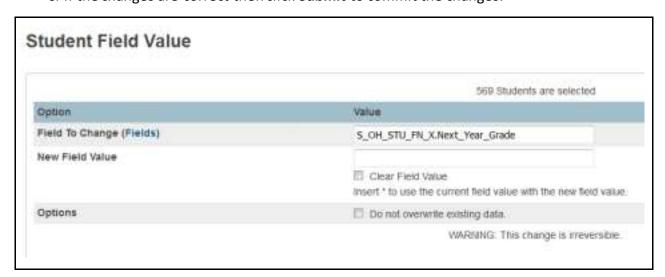
The following is provided to assist EMIS Coordinators or other district staff with items unique to PowerSchool. You will still need to complete all the "normal" things that are required to be done for end of year EMIS reporting. Examples are importing test scores, withdrawals, or any other changes that are normally completed before 'Yearend (S)' reporting.

EMIS Attributes—No Date Record (FN) updates:

The Student Attributes—No Date Record (FN) data must be updated for your graduates (excludes summer grads). This can be done either manually or by using the 'Student Field Value' function to update a list of graduates as outlined below:

Mass update using 'Student Field Value' function:

- 1. Search for and select your graduate students.
- 2. Navigate to Start Page > Special Functions > Group Functions > Student Field Value.
- 3. In the **Field to Change** text box enter the field name of the field to change.
- 4. In the New Field Value text box, enter the new value.
- 5. Click **Submit**. A list of all of students affected by the change will be generated showing the old value in the field as well as the new value entered.
- 6. If the changes are correct then click **Submit** to commit the changes.



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Three fields to update

- 1) Grade Level, Next Year: Field name: S OH STU FN X.Next Year Grade value needs to be set to 'GR'.
- 2) Diploma Type: Field Name: S_OH_STU_FN_X.Diploma_Type Mass change to '1' for Regular Diploma.

 ** Once change is made then you will need to update individual students for those receiving an Honors diploma (2).
- **3) Diploma Date:** Field Name: S_OH_STU_FN_X.Diploma_Date the date that the student received his/her diploma.

Reference: Section 2.6 Student Attributes—No Date Record (FN) of the EMIS Guide.

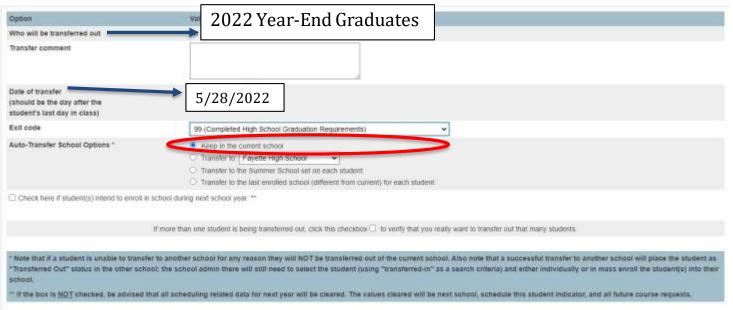
Transfer Graduates Out Of School

This process will run the 'Transfer Out Of School' option to transfer your graduates.

First, select your Graduates. Then return to the Start Page. (Your Current Selection should contain just your graduates.) ** NOTE make sure you do not include your early graduates in this selection as they are already withdrawn and you do not want to change their exit date. **

Path: Special Functions > Group Functions > Transfer Out Of School

Transfer Out Of School



Be sure to check this box:

If more than one student is being transferred out, click this checkbox 🗹 to verify that you really want to transfer out that many students

Selections to enter:

- Optional: Transfer comment you may enter message such as '2022 Year-end Graduates'.
- Required: Date of Transfer Date must be one day after students last day in class.

****Important*** The actual Date of Transfer date must match the 'Last Day of School' date on your 'Grade Schedule (DL)'record for your grade 12 students. If 'Last Day of School' on the DL record is 5/27/2022, then the 'Date of Transfer' should be 5/28/2022 as PowerSchool subtracts 1 day from the Date of Transfer (see screenshot of DL record on next page).

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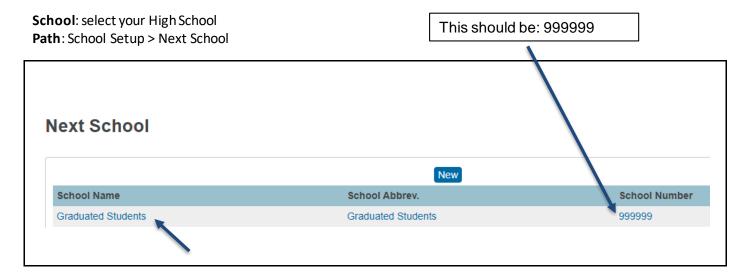
Path: District> Building/District Information> Grade Schedule (DL) (FY2022) tab:



- Required: Exit Code Enter '99' for Completed High School Graduation Requirements.
- <u>Required:</u> Auto-Transfer School Option set to 'Keep in the current school' as this is done to keep the graduates in the current building for the 'End of Year Student Collection' EMIS reporting.

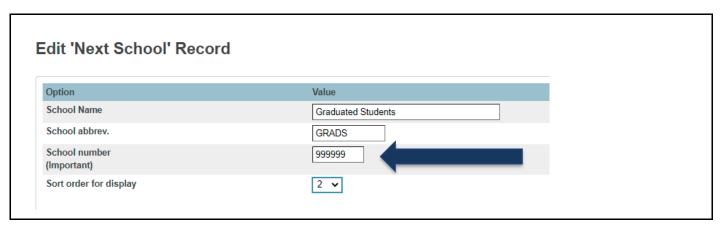
Reminder - Verify school number for Graduate Building

Please verify that the School Number for the Graduate Building has been updated. The School Number needs to be set to all 9's such as '999999'.



If the School Number isn't defined or defined incorrectly then update by either clicking on the Graduate Building name under 'School Name' –OR-follow:

Path: School Setup > Next School > Next School



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Reminder – Career Center and Open-Enrollment Graduates

<u>Reporting Rule:</u> The district issuing the diploma is to report a withdrawal code of '99', Diploma Date, Diploma Type, and Withdrawal Date.

<u>Career-Technical Graduates:</u>

The district of resident issues the diploma. JVSDs do not report the Diploma Date nor Diploma Type but are responsible for reporting the Effective End Date as of the student's last day of school and a Withdrawal Reason of '99'.

Open Enrollment Graduates:

The attending district issues the diploma. The resident district withdraws student using a withdrawal code of '41' and does not report the Diploma Date nor Diploma Type. The Effective End Date is required to be reported by both districts and is reported with the date of the student's last day of school. (In PowerSchool, enter the day AFTER the student's last day of school.)

<u>"Social Graduates":</u> OH_NextYearGrade should be '13' – Enrolled, completed course requirements, but has not passed graduation test and is attending school.

<u>Special Education Non-Graduates:</u> OH_NextYearGrade should be '23' if this description describes the student: 'Student is under age 22, has a disability, has completed graduation requirements, and has not yet received a diploma.'

Reference: Section 2.4: Student Standing Record (FS) of the EMIS Guide.

Wiki > Student Services Public > EMIS > Documentation & Meetings > 15G EMIS Reporting Revised:

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